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TO SECSTATE WASHDC PRIORITY 1410

UNCLAS SECTION 1 OF 7 JIDDA 2019

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TAGS: AFSP, BEXP, SA
SUBJ: FY 79 CCP - SAUDI ARABIA

REF: (A) STATE 62483, (B) STATE 118

1. SECTION I - OVERVIEW

SAUDI ARABIA, DESPITE EARLIER DOUBTS OF ACHIEVING THE 1975-1980 \$142 BILLION FIVE-YEAR DEVELOPMENT PLAN, APPEARS TO BE ON SCHEDULE WITH OVER HALF OF THE PROJECTS IN THE PLAN AWARDED TO CONTRACTORS AND IN PROGRESS. IN SOME SECTORS ACHIEVEMENT HAS EXCEEDED THE GOALS SET, NOTABLY INFRASTRUCTURE PROJECTS, SUCH AS PORTS IMPROVEMENTS, ROADS, AND URBAN RECONSTRUCTION. EVEN NOW THE MINISTRY OF PLANNING HAS STARTED WORK ON THE 3RD FIVE-YEAR PLAN -1980-1985. INFLATION PRESSURESS, WHICH EASED IN 197, THE RUSH TO BEGIN PROJECTS, AND DEMANDS FOR LUMP-SUM BIDS HAVE ACCELERATED PROJECT COSTS GREATLY AND IT APPEARS THAT EVEN IF ALL OF THE THE PROJECTS IN THE CURRENT PLAN ARE NOT IMPLEMENTED, THE MONEY WILL BE SPENT. THE ECONOMIC THRUST PROVIDED BY HUGE OIL REVENUES HAS RAISED THE NON-OIL RELATED GNP, APPROXIMATELY \$11 BILLION, TO OVER DOUBLE THE TOTAL GNP OF THE 1972 PERIOD. REGARDLESS OF THE VALIDITY OF ITS ECONOMIC GOALS, SAUDI ARABIS CONTINUES DETERMINED TO DEVELOP A DOMESTIC INDUSTRIAL ECONOMY BY ESTABLISHING PERTINENT INDUSTRIES TO USE ITS MOST ABUNDANT NATURAL RESOURCES, HYDROCARBONS.

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BUTTRESSED BY ITS OWNERSHIP OF 25 PERCENT OF THE WORLD'S PETROLEUM RESERVES, THE HIGHER REVENUE NOW REALIZED FROM OIL EXPORTS, AND THE SUBSEQUENT AFFLUENCE, ITS ECONOMY AND ITS WORLD IMPORTANCE AS AN EXPORT MARKET IS GROWING. IT IS THE LEADING U.S. EXPORT MARKET IN THE MIDDLE EAST HAVING OUTSTRIPPED IRAN IN 1977. IN 1977, ITS IMPORTS ARE ESTIMATED TO TOTAL APPROX-

IMATELY \$15 BILLION (CIF) OF WHICH THE U.S. SUPPLIED \$3.575 BILLION (FOB). THE U.S. SHARE IS CALCUTATED AT 25 PERCENT ON THE BASIS OF A 10 PERCENT INCREASE IN THE FOB FIGURE FOR SHIPPING COSTS.U.S. EXPORTS IN 1974 WERE \$850 MILLION; IN 1975 \$1.5 BILLION; AND IN 1976 \$2.8 BILLION. DESPITE THIS ABSOLUTE GROWTH, THE U.S. PERCENT-AGE SHARE OF THE MARKET DECREASED FROM AN AVERAGE 31 PERCENT SHARE OF THE MARKET IN THE PRE-1973 YEARS. AT THE SAME TIME, U.S. OIL IMPORTS FROM SAUDI ARABIA HAVE RISEN TO \$6.358 BILLION IN 1977 FROM \$2.6 BILLION IN 1975. CURRENTLY, SOME 25 PERCENT OF OUR OIL IMPORTS ARE FROM SAUDI ARABIA, GIVING US A TRADE DEFICIT DESPITE THE INCREASED EXPORT VOLUMES. COMPETITION FROM EUROPE AND ASIA FOR THIS LUCRATIVE MARKET IN INCREASING SHARPLY AS INDUSTRIAL COUNTRIES IN THOSE AREAS ALSO HAVE TRADE DEFICITS WITH SAUDI ARABIA WHICH THEY ARE ANXIOUS TO REDRESS BY EXPORTS. AT PRESENT THE PRINCIPAL SOURCE OF U.S. EARNING IN COMMERCIAL RELATIONS WITH SAUDI ARABIA IS THE REVENUE FROM THE LARGE VOLUME OF U.S. SERVICES AND CONSTRUCTION. CONTRACTS. THERE ARE NOW 325 U.S FIRMS BASED IN SAUDI ARABIA. THE U.S. CORPS OF ENGINEERS IS CURRENTLY SUPERVISING OVER \$22 BILLION IN CONSTRUCTION CONTRACTS.U.S. FIRMS ARE IMPLEMENTING THE EASTERN PROVINCE GASEFICATION PROJECT (\$14 BILLION) SUPERVISING THE JUBAIL ANDYENBO INDUSTRIALIZATION PROJECTS, (\$15 BILLION OR MORE), ENGINEERING UNCLASSIFIED

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AND SUPERVISING CONSTRUCTION OF AN 800-MILE PIPELINE. AND ARE INVOLVED IN MAJOR PROJECTS WITH ALMOST EVERY MINISTRY. DESPITE BILATERAL PROBLEM AREAS RELATED TO U.S. ANTI-BOYCOTT LEGISLATION AND TAX REGULATIONS EHICH HAVE INHIBITED SOME TRADE AND MADE IT MORE DIFFICULT TO RECRUIT U.S. PERSONNEL, THE CLIMATE IS STILL GOOD FOR U.S. COMMERCIAL GROWTH IN THIS MARKET. NEVERTHELESS, TO MAINTAIN OUR POSITION WILL REQUIRE EXTRA EFFORT IN TRADE PROMOTION. IN THE FINAL ANALYSIS, HOWEVER, POLITICAL DECISIONS WILL GREATLY AFFECT OUR ECONOMIC AND COMMERCIAL STATUS VIS-A-VIS SAUDI ARABIA.

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TO SECSTATE WASHDC PRIORITY 1411

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2. SECTION III CAMPAIGN DEVELOPMENT

CAMPAIGN NO. 1 PRIORITY 1

TITLE: TELECOMMUNICATIONS EQUIPMENT

CAMPAIGN MGRS: EBLAN/Ryan

ALL THE CONTRACTS FOR SAUDI ARABIA'S HUGE TELECOMMUNICATIONS BACKBONE PROJECT HAVE NOW BEEN AWARDED. ESTIMATED COMPREHENSIVE COSTS FOR THE PROJECTS ARE OVER \$5 BILLION. U.S. FIRM HAVE WON THE MICROWAVE LINK-UP PROJECT AND THE SATELLITE GROUND STATIONS BUT MISSED THE LARGEST CONTRACT WHICH WAS WON BY AN EUROPEAN CANADIAN CONSORTIUM. BY 1980 THERE WILL BE 660,000 NEW TELEPHONE LINES INSTALLED IN MODERN NETWORK. OVER 10,000 NEW TELEX LINES WILL BE ADDED. THE CONSTRUCTION OF NEW MINISTRY BUILDINGS AT RIYADH, TAIF AND MINISTERIAL BRANCH OFFICES AT JIDDA COMBINED WITH THE CONSTRUCTION OF COMPLETE NEW CITIES AT HAIF AL BATN, JUBALI AND YENBO, A VARIETY OF NEW BUILDINGS FOR SAG AGENCIES SUCH AS THE GENERAL ELECTRICITY CORPORATION. SAUDI BASIC INDUSTRIES CORP., AND OTHERS, WILL REQUIRE LARGE AMOUNTS OF COMMUNICATIONS EQUIPMENT. TELECOMMUNICATIONS EQUIPMENT WILL ALSO BE REQUIRED FOR THE 13,500 KILOMETERS OF NEW HIGHWAYS, THE 800-MILE OIL AND GAS PIPELINES FROM ABQAIQ TO YENBO, AND THE SUPER AIRPORTS TO BE BUILT. THE U.S. HAS YET TO ORGANIZE A TRADE PROMOTION EVENT IN THIS FIELD AND IF COMPETITION FROM EUROPEAN AND JAPANESE PRODUCERS IS TO BE MET, TI WILL HAVE TO DO SO SOON, AT LEAST BEFORE THE NEW LINES UNCLASSIFIED

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ARE OPERATIVE.

CAMPAIGN ACTIONS CUMULATIVE MILESTONE

A) PREPARE POST INPUT AND JUSTIFICATION JUNE 1978

WITH LIST OF COMMERCIAL TARGETS FOR

A SPECIALIZED TRADE MISSION. INITIATE

MARKET RESEARCH STUDY.

B) INTENSIFY EFFORTS TO HAVE SAUDIS VISIT SEPT. 30

INDIVIDUALLY OR IN A GROUP PERTINENT

TRADE SHOWS, CONVENTIONS, AND SEMINARS

ON TELECOMMUNICATIONS IN THE U.S.

C) REPORT STATUS OF MAJOR PROJECTS
INVOLVING TELECOMMUNICATIONS.
D) ORGANIZE A SPECIALIZED TRADE MISSION
IN TELECOMMUNICATIONS TO TAKE PLACE
IN LATE SPRING OR IN THE FALL OF 1979.

CAMPAIGN NO. 2 PRIORITY 2

TITLE: AVIONICS AND GROUND SUPPORT SYSTEMS
CAMPAIGN MGR: NO. 2 COMMERCIAL ECON OFFICER AT
EMBASSY, JIDDA COVERING CIV/AV

THE SAG HAS EXPANDED THE NUMBER OF AIRPORTS IT WILL
BUILD TO 23 AND PLANS TO BUILD AN AIRPORT NEAR MECCA,
OVERCOMING RELIGIOUS ARGUMENTS AGAINST SUCH A PROJECT.
AMONG THE LARGE AIRPORT PROJECTS IN THE NEW JIDDA
AIRPORT SCHEDULED FOR COMPLETION AND TEST RUNS IN LATE
1979, COVERING 67 SQUARE MILES IN AREA, IT WILL BE
THE SHOW PIECE OF THE NATION. CURRENT ESTIMATES OF
COST ARE OVER \$4 BILLION. A LARGER, 115 SQUARE MILE
AIRPORT IS PLANNED FOR RIYADH. DHAHRAN ALSO WILL HAVE
A NEWER AND LARGER AIRPORT NOW BEING DESIGNED BY AN
AMERICAN FIRM. IT IS KNOWN THAT THE SAG PLANS TO
HAVE MOBILE LOUNGES FOR THE AIRPORTS AT JIDDA AND
RIYADH. AIR TRAFFIC WITHIN THE COUNTRY HAS INCREASED
OVER 350 PERCENT SINCE 1974 AND THE SAUDIA FLEET IS
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GROWING RAPIDLY. THE INCREASE IN DOMESTIC AIR TRAFFIC
REQUIRES A PARALLEL INCREASE IN FLIGHT AND TERMINAL
SAFETY EQUIPMENT. ELECTRONIC FLIGHT INFORMATION AND
PASSENGER CONTROL EQUIPMENT WILL HAVE TO MATCH THE
SIZE, SCOPE AND HIGH COST OF THE AIRPORTS NOW BEING
PLANNED AND BUILT. GROUND TO AIR COMMUNICATIONS,
SYSTEMS, AIR CONTROL SYSTEMS, MATERIAL AND BAGGAGE
HANDLING EQUIPMENT, GROUND SAFETY CONTROL AND METEORO-
LOGICAL EQUIPMENT WILL BE REQUIRED IN VOLUME. ABOVE
ALL, GIVEN THE LOCAL LAXITY ON UPKEEP, THE SAUDIS
WILL NEED MODERN AND PREFERABLY AUTOMATED AIRPORT AND
TERMINAL MAINTENANCE EQUIPMENT. JOINT VENTURE BY
SPECIALIZED U.S. FIRMS IN THIS FIELD WILL HAVE GOOD
PROSPECTS.

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CAMPAIGN ACTIONS: THESE WILL REQUIRE INPUT FROM
JIDDA, USLO RIYADH AND DHAHRAN.

A) 3. EMBASSY TO KEEP USDOC ABREAST OF DECEMBER
PROGRESS ON AIRPORT PROJECTS AND
SIGNAL APPROPRIATE TRADE OPPORTUNITIES
IN THIS FIELD.

B) EMBASSY TO MAINTAIN CLOSE CONTACTS SEPTEMBER
WITH ENGINEERING FIRMS SUCH AS
PARSONS AND BECHTEL WHICH ARE
SUPERVISING CONSTRUCTION ON JIDDA
AND RIYADH AIRPORTS TO CHECK ON
STANDARDS AND REQUIREMENTS OF
THE AIRPORTS.

C) FORMULATE A LIST OF KEY SAUDI JUNE
DECISIONMAKERS TO RECEIVE U.S.
LITERATURE IN THIS FIELD.

D) PREPARE FOR A SPECIALIZED TRADE MARCH
MISSION IN LATE FY 1979 OR BETTER,
EARLY IN FY 1980. NO TM IN THIS
PRODUCT CATEGORY HAS YET VISITED
SAUDI ARABIA. COMMERCE TP EVENTS
HAS THIS SCHEDULED FOR
DECEMBER 1979.

CAMPAIGN NO. 3 PRIORITY 3

TITLE: HEALTH CARE AND HOSPITAL EQUIPMENT

CAMPAIGN MGR: E/C FSO - JIDDA/RIYADH

THIS CATEGORY WAS SUGGESTED IN CCPS SUBMITTED IN
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1977 AND 1978. IN 1977, ON THE EMBASSY'S INITIATIVE,
THE SAUDI MINISTER OF HEALTH MADE HIS FIRST VISIT
TO THE UNITED STATES. HEALTH CARE FOR ITS CITIZENS
IS A PRIME PRIORITY FOR THE KINGDOM. IT IS CONSIDERED
ONE OF THE MOST IMPORTANT PROJECTS FOR MAINTAINING
POLITICAL STABILITY. IN ADDITION TO THE MINISTRY
OF HEALTH'S PLANNED EXPENDITURE OF \$7 BILLION FOR
HOSPITAL AND CLINICS, THE MINISTRIES OF INTERIOR,
DEFENSE AND AVIATION AND THE SAUDI NATIONAL GUARD
HAVE PLANS FOR NEW HOSPITALS AND CLINICS WHICH WILL

BOOST THE AMOUNT SPENT IN THIS CATEGORY TO OVER \$10 BILLION IT IS POSSIBLE THAT THE GOVERNMENT'S PLANS FOR 11,500 NEW HOSPITAL BEDS WILL BE SCALED DOWNWARDS. NEVERTHELESS, THE CONSTRUCTION OF HOSPITALS IN THE PRIVATE SECTORS HAS INCREASED SUFFICIENTLY TO COVER ANY DECREASE BY THE SAG WHICH IS NOW EMPHASIZING PREVENTATIVE MEDICAL CARE AND MORE CLINICS. LARGE CONSTRUCTION COMPANIES OPERATING IN THE KINGDOM ALSO ARE PLANNING TO PROVIDE HEALTH FACILITIES FOR THE IMPORTED LABOR NOW ESTIMATED AT OVER 1,000,000 WORKERS. THE JUBAIL PROJECT WHEN IN FULL SWAY WILL HAVE ABOUT 30,000 WORKERS, ALMOST ALL EXPATRIATES. KING KHALID CONSTRUCTION AT AL BATN WILL HAVE 35,000 WORKERS. THE GASIFICATION PROJECT WILL EVENTUALLY EMPLOY 20,000 EVEN SMALL COMPANIES OPERATING IN SAUDI ARABIA FEEL CONSTRAINED TO SUPPLY MEDICAL SERVICES. FOREIGN FIRMS IN THE OPERATIONAL AND MANAGEMENT SECTOR APPEAR TO BE CLOSE TO SATURATION POINT BUT ALL TYPES OF MEDICAL SUPPLIES AND EQUIPMENT, PARTICULARLY DISPOSABLES ARE, AND WILL CONTINUE TO BE, IN HIGH DEMAND. HOSPITAL FURNISHINGS, EXAMINATION AND OPERATING ROOM EQUIPMENT WILL BE IN PROPORTIONATE HIGH DEMAND AS CLINICS AND HOSPITALS ARE BUILT. MOBILE
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CLINICS WOULD APPEAR TO HAVE GOOD POTENTIAL FOR THE WIDELY DISPERSED AND LIGHTLY POPULATED VILLAGE AREAS. CAMPAIGN ACTIONS:

- A) PREPARE A LIST OF ALL OFFICIAL AND DECEMBER PRIVATE FACILITIES, EXISTING AND PLANNED, IN THE HEALTH SECTOR FOR BENEFIT OF U.S. FIRMS.
- B) COMPLETE PLANNING FOR THE HEALTH CARE DECEMBER SPECIALIZED MISSION SCHEDULED FOR MARCH 1979 BY COMMERCE.

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C) PROVIDE EARLY INFO TO PERTINENT SAG MARCH
OFFICIALS ON THE MISSION. ASSIGN A
PROMINENT OFFICIAL FROM HEW TO LEAD
MISSION, PREFERABLY SOMEONE WHO MET
SAUDI MINISTER OF HEALTH DURING HIS
WASHINGTON TRIP.

D) MEMORANDUM TO USIS TO ASSIST IN PRO- SEPTEMBER
MOTION OF THIS PRODUCT CATEGORY BY USE
OF AUDIO VISUAL EQUIPMENT SHOWING
LATEST STATE-OF THE - ART.

CAMPAIGN NO. 4 PRIORITY 4
TITLE: INSTITUTIONAL AND RESIDENTIAL FURNITURE
CAMPAIGN MGRS: JIDDA - ROBINSON - FSO-6
DHAHRAN - SCOGNA - FSO-7

A STUDY MADE BY THE MINISTRY OF INDUSTRY AND
ELECTRICITY'S INDUSTRIAL STUDIES AND DEVELOPMENT CENTER
AT RIYADH ESTIMATES THAT BY 1982 THERE WILL BE CONSTRUCTED
103.3 MILLION SQUARE METERS OF BUILDING FLOOR SPACE IN
THE KINGDOM: 15 MILLION SQ/M OF VILLAS BY THE PRIVATE
SECTOR, 2.7 MILLION SQ/M OF VILLAS BY THE SAG;
7.1 MILLION SQ/M IN APARTMENT DWELLING IS BY THE PRIVATE
SECTOR; 10.9 MILLION SQ/M APARTMENTS BY THE SAG, AND
67.6 MILLION SQ/M IN GOVERNMENT BUILDINGS. THE REQUIRE-
MENTS FOR FURNISHING THIS AREA OF SPACE IS STAGGERING AND
PRESENTS ONE OF THE BEST AND LARGEST POTENTIALS FOR U.S.
FIRMS. ADDED TO THE JUSTIFICATION FOR A CAMPAIGN IN THIS
CATEGORY IS THE RECENT TRENN
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CATAGORY IS THE RECENT TREND BY SAUDI FIRMS TO MODERNIZE
THEIR BUSINESS PREMISES. UP TILL NOW, EVEN THE MOST
AFFLUENT SAUDI FIRMS, HAD DINGY OFFICES. THE SCOPE OF
THEIR GROWING ENTERPRISES AND THE NEED FOR GREATER
EFFICIENCY IN MODERN QUARTERS HAS STIMULATED A FAST GROW-
ING TREND IN REFURBISHING BUSINESS ESTABLISHMENTS. A
NUMBER OF LARGE OFFICE BUILDINGS ARE BEING ERECTED IN
JIDDA, RIYADH AND DHAHRAN WHICH WILL BE IN ADDITION TO
THE ABOVE SQUARE METER DATA. ITALY, SWEDEN, FINLAND,
FRANCE AND DENMARK HAVE ENTERED THE MARKET IN STRENGTH,
BUT U.S. PRODUCTS WOULD COMPARE FAVORABLY AND, IF CURRENT
DOLLAR PRICES MAINTAIN, COULD BE COMPETITIVE NOT ONLY
FROM THE POINT OF VIEW OF QUALITY BUT ALSO IN PRICE.
SEVERAP INITIATIVES TO AMOUNT TRADE MISSIONS IN THIS

CATEGORY HAVE FAILED. BECAUSE OF ITS POTENTIAL, THIS
PRODUCT CATEGORY SHOULD BE PROMOTED EITHER BY A SPECIAL-
IZED TM OR A CLASS II EXHIBIT.

CAMPAIGN ACTIONS:

A) COMMERCE SHOULD PROVIDE A LIST OF U.S. SEPTEMBER
FIRMS AND , IF POSSIBLE, BROCHURES TO THE
POST WHICH WILL ATTEMPT TO RECRUIT
PARTICIPANTS. ALTERNATIVELY, INTERESTED
FIRMS SHOULD BE ENCOURAGED BY COMMERCE
TO SEND BROCHURES AND CATALOGS FOR
EVALUATION BY THE POST FOR RECRUITMENT
TO A CLASS II EXHIBIT. MARKET RESEARCH
TO IDENTIFY PRODUCT CONTENT SHOULD BE
UNDERTAKEN.

B) POST SHOULD PREPARE A BLUE RIBBON LIST SEPTEMBER
OF SAUDI AGENT AND DEALERS, AS WELL AS
SAUDI GOVERNMENT PURCHASING AGENCIES
FOR TENDER ISSUANCES. A SITE SURVEY
SHOULD BE PREPARED.
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C) EITHER A SPECIALIZED TM OR A CLASS II MAY 1979
EXHIBIT IN RIYADH.

CAMPAIGN NO. 5 PRIORITY NO. 5
TITLE: EDUCATIONAL AND CLASSROOM EQUIPMENT
CAMPAIGN MGR: SENIOR E/C OFFICER, RIYADH OR JIDDA
THE MOST RAPID GROWTH IN THE SAUDI ECONOMIC AND
SOCIAL STRUCTURE IS THE DRAMATIC INCREASE IN THE STUDENT
POPULATION. KING ABDUL AZIZ UNIVERSITY IN JIDDA HAS
DOUBLED ITS STUDENT ENROLLMENT EACH YEAR FOR THE PAST
FOUR YEARS. THE KINGDOM HAS FORGED AHEAD WITH ITS IN-
CREASE IN FEMALE ENROLLMENT. ADULT EDUCATION PROGRAMS
ARE BEING ENVISAGED AND THE GOVERNMENT IS UNDERTAKING A
BROAD VOCATIONAL TRAINING PROGRAM IN CONJUNCTION WITH
THE U.S. SAUDI JOINT ECONOMIC COMMISSION. TRAVELLING
CLASSROOMS ARE BEING PLANNED FOR BEDOUINS.

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THE SINGULAR LACK OF SUFFICIENT NATIVE TEACHERS AND THE PAUCITY OF QUALIFIED EXPATRIATES ARE POSING A PROBLEM THAT ONLY MASS EDUCATION TECHNIQUES CAN SOLVE. EQUIPMENT USED IN CLOSED CIRCUIT VIDEO INSTRUCTION AND OTHER FORMS OF AUDIO-VISUAL EDUCATIONAL METHODS WILL BE A NECESSITY. SCHOOLING FURNISHINGS AND APPLIANCES SUCH AS DESKS, WRITING SUPPLIES, TIMING SYSTEMS, RECREATIONAL EQUIPMENT AND TRAINING MATERIALS ARE AMONG FOREMOST NEEDS. SPECIFIC PRODUCTS IN THIS CATEGORY WILL HAVE TO BE RE-SEARCHED GIVEN THE RELATIVE INFANCY OF THE INDUSTRY AND THE PECULIARITIES OF THE SAUDI EDUCATIONAL SYSTEM. HIGHER EDUCATION NEEDS APPLICABLE TO UNIVERSITIES, HOWEVER, CLOSELY PARALLEL REQUIREMENTS IN COMPARABLE AMERICAN INSTITUTIONS. THE LARGE NUMBER OF SAUDI GRADUATES OF U.S. COLLEGES SHOULD BE A PLUSFACTOR IN THIS CAMPAIGN.

CAMPAGIN ACTIONS:

A) THE EMBASSY AND USLO RIYADH WILL CONTACT SEPTEMBER APPROPRIATE SAUDI OFFICIALS IN THE TWO EDUCATIONS MINISTRIES TO ASCERTAIN SPECIFIC PRODCUT TARGETS WITH MOST SALES POTENTIAL.

B) PREPARE POST INPUT ON A PROJECTED DECEMBER SPECIALIZED TRADE MISSION IN THE EDUCATIONAL FIELD.

C) COMMERCE TO RECRUIT PARTICIPANTS FOR A MARCH SPECIALIZED TRADE MISSION OR ADVISE STATE IOGAS TO INCLUDE THE CATEGORY IN UNCLASSIFIED

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MISSIONS PLANNED FOR THE KINGDOM.

D) HOLD A MISSION IN EARLY JUNE.

NOTE: USDOC MAY WONDER WHY WE HAVE OMITTED CONSTRUCTION AND HEAVY TRANSPORT EQUIPMENT FOR FY 1979. SAUDI ARABIA'S CURRENT IMPORTS FROM THE U.S. COMPRISE OVER 65 PERCENT IN THIS CATEGORY AND WE FIND THAT U.S. MANUFACTURERS ARE VERY WELL REPRESENTED IN THESE LINES. THE LOCAL CATEPILLAR AGENT ALONE SOLD OVER 2000 PIECES OF HEAVY EQUIPMENT HERE IN 1977. THE CATEGORY IS INCLUDED IN TRADE PROMOTION EVENTS RECOMMENDED FOR 1980, AND WILL INCLUDE HEAVY TRANSPORT, PIPELINE AND ROAD REPAIR EQUIPMENT. LIKEWISE, WATER RESOURCES WILL BE COVERED IN 1978.

3. SECTION IV OTHER POST SPECIAL EFFORTS

ACTIVITY NO 1 PRIORITY 1

TITLE: MAJOR PROJECTS - EARLY WARNING/DESCRIPTION/

JUSTIFICATION/OBJECTIVES AND ACTION

THERE ARE ROUGHLY OVER 100 MAJOR PROJECTS IN THE SAUDI GOVERNMENT'S FIVE - YEAR PLAN STILL TO BE TENDERED AND AWARDED. IT IS ESTIMATED THAT THE ROYAL COMMISSION FOR JUBAIL AND YENBO WILL AWARD SOME 50 TO 60 MORE PROJECTS BEFORE THE END OF FY-79. IN ADDITION, THE PRIVATE SECTOR IS BEGINNING TO INCREASE CONSTRUCTION AND IMPLEMENTATION OF SIGNIFICANT MAJOR PROJECTS VIA THE TENDER ROUTE. HOTELS, OFFICE BUILDINGS, AND RESIDENTIAL COMPLEXES ARE BEING PLANNED IN JIDDA, RIYADH AND DHAHRAN. LAND IN THESE URBAN CENTERS HAS BECOME SO COSTLY THAT PURCHASE IS ONLY PROFITABLE FOR CONSTRUCTION OF MULTI-STORIED BUILDINGS. DURING THE PAST FISCAL YEAR, EMBASSY JIDDA HAS ASSIGNED THE TOP RANKING COMMERCIAL FSL TO COMPILE PROJECT REPORTS TO WASHINGTON ON A REGULAR BASIS. RESIGNATIONS AND STAFF SHORTAGES HAVE AFFECTED THE TIMELINESS OF SUCH

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REPORTS. EVERY U.S. BUSINESS VISITOR TO THE EMBASSY HAS REPEATEDLY EMPHASIZED THE VALUE OF EARLY PROJECT INFORMATION AND THE COMPILATION OF A LIST OF PROJECTS WHICH WILL OFFER MULTIPLE OPPORTUNITIES TO U.S. SUBCONTRACTORS AND EQUIPMENT SUPPLIERS. THERE IS NO DOUBT THAT EXTRA EFFORTS IN THIS AREA ARE JUSTIFIED.

WITH THREE REPORTING POSTS, IT IS DIFFICULT FOR THE EMBASSY TO SELECT PROJECTS OUTSIDE OF ITS AREA FOR FLAS REPORTING. THIS SHOULD BE DONE BY EACH CONSTITUENT POST FOR ITS OWN AREA. THE EMBASSY PLAN, HOWEVER, WILL COORDINATE MAJOR PROJECT REPORTING ON AN AD HOC BASIS BY EACH POST AND COMPILE THE TOTAL LIST BY MINISTRY, SAUDI AGENCY, AND PRIVATE SECTOR ON A MONTHLY OR BI-MONTHLY BASIS. ATTEMPTS WILL BE MADE COUNTRY - WIDE TO OBTAIN INFORMATION NOT ONLY ON AWARDS BUT UPCOMING UNAWARDED PROJECTS, PREFERABLY BEFORE THEY ARE REPORTED IN THE PRESS. EACH POST WILL REPORT MAJOR PROJECTS IN ITS AREA TO WASHINGTON WITH A COPY TO EMBASSY JIDDA AND THE OTHER POSTS AS THE CASE MAY BE TO AVOID SLIPPAGE. THE IDENTIFY OF THE AWARD WINNER, SO OFTEN OMITTED IN PRESS REPORTS, WILL BE A MAJOR FOCUS OF INFO GATHERING.

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IN 1977, COMMERCE INDICATED THAT IT WOULD UNDERTAKE
COMPILATION OF PROJECTS. IF THIS IS YET THE CASE, THE
EMBASSY WILL REQUEST COPIES OF THE REPORTS.

ACTIVITY NO. 2 U.S. FIRMS LIST PRIORITY 2
DESCRIPTION, JUSTIFICATION AND OBJECTIVES.
THE EMBASSY SHOULD EXPAND COVERAGE AND IMPROVE FORMAT
OF THE LIST OF U.S. FIRMS WHICH IT NOW PREPARES INFORMALLY
IN SAUDI ARABIA FOR LOCAL USE ONLY. THE PRESNET
MIMEOGRAPHED VERSION IS IN CONSTANT DEMAND BY EMARICAN,
SAUDI AND THIRD-COUNTRY BUSINESSMEN AS A BUYERS GUIDE TO
U.S. PRODUCTS AND SERVICES IN SAUDI ARABIA. IT ALSO
ASSISTS LOCALLY BASED U.S. FIRMS TO KNOW THAT THREE ARE
OTHER U.S. FIRMS IN THE KINGDOM WITH WHOM THEY CAN DEAL
IN THE SHORTEST TIME. AS STATED, THIS PUBLICATION IS FOR
USE ONLY WITHIN SAUDI ARABIA FOR U.S. TRADE PROMOTION.
THERE ARE NO KNOWN ALTERNATIVES FROM U.S. COMMERCIAL SOURCES
WHICH WOULD FIND IT NEARLY IMPOSSIBLE TO PUT TOGETHER AN
UPDATED LIST. THERE ARE NOW 325 U. S. FIRMS BASED HERE
AND THE NUMBER IS INCREASING AT THE RATE OF 4 PER MONTH.
ACTIONS: (1) ARRANGE THROUGH USIS RSC IN MANILA FOR
PRINTING OF BOUND BOOKLET ANNUALLY INSTEAD OF STENCILED
LIST. (2) UPGRADE QUALITY OF INFORMATION BY PREPARING
DETAILED INDICES ON PRODUCT CATEGORIES AND ALPHABETICALL6.
FIRM AND INDIVIDUAL NAMES SECTIONS. (E3) INTENSIFY EFFORTS
TO GET ALL U.S. FIRMS LISTED. (4) COMMERCE AND STATE
ASSISTANCE IN THIS RESPECT DURING WASHINGTON BRIEFINGS
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OF POTENTIAL INVESTORS WOULD BE USEFUL.
ACTIVITY NO. 3 PRIORITY 3
TITLE: EXPAND U.S COMMERCIAL CENTER PROGRAMS AT JIDDA.
DURING THE COMMERCIAL CENTER'S TENURE AT THE PRESENT
LOCATION NEAR THE EMBASSY SINCE OCTOBER 1976, THE
COMMERCIAL UNIT, AT THE INITIATIVE OF LARON JENSEN, FSR-5.

HAS SPONSORED A NUMBER OF ACTIVITIES AT THE U.S. COMMERCIAL CENTER. THESE INVOLVED VISITING AS WELL AS RESIDENT U.S. VISITORS AND SAUDI BUSINESSMEN OF THE EXECUTIVE CATEGORY. EVENTS HAVE INCLUDED JOINT SPONSORSHIP OF TECHNOLOGICAL AND SOCIAL DISCUSSIONS WITH U.S. SPEAKER, FILM SHOWINGS WITH COCKTAIL RECEPTIONS, SMALL REVOLVING

DISPLAYS OF U.S. PRODUCTS, AND VTR PRESENTATIONS IN MAY OF 1978. A MINI-EXHIBIT WILL BE HELD IN COOPERATION WITH A U.S. CEM FIRM IN INSTITUTIONAL FURNISHINGS AND BUILDING MATERIALS, THIS ACTIVITY HAS PROVEN TO BE VERY BENEFICIAL IN GIVING THE CENTER EXPOSURE TO HIGHER ECHELON SAUDI BUSINESS MAN WHO, AT THE SAME TIME AS THE CENTER EVENTS, HAVE BEEN ABLE TO EXAMINE OUR ADS LIST AND U.S. TRADE OFFERS FIRST HAND. THE ACTIVITY SHOULD AND WILL BE EXPANDED.

ACTION: (1) CONTINUE EXCELLENT COOPERATION WITH USIS IN BORROWING OF APPROPRIATE VTRS AND FIRM CLASSICS FOR SHOWING SAUDI BUSINESSMEN, (2) REPAVE OUTSIDE FRONT AREA OF CENTER GARDEN TO ALLOW USE OF OUTER BUILDING FOR LARGER GATHERING, (3) SPRUCE UP CENTER TO REPRESENT FAVORABLE U.S. COMMERCIAL IMAGE. (4) PLAN FOR AT LEAST 20 EVENTS ANNUALLY AND CONCENTRATE ON IMPORTANT SAUDI INVITEES WHO HAVE NOT YET VISITED CENTER. (5) HAVE AMBASSADOR OR DCM HOST THE MORE PRESTIGIOUS EVENTS AT THE CENTER TO ATTRACT MORE SAUDI DECISION-MAKERS, PRIVATE AND OFFICIAL.

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ACTIVITY NO4 COMMERCIAL NEWSLETTER PRIORITY 4
DESCRIPTION/JUSTIFICATION/ OBJECTIVES
SINCE 1976 THE EMBASSY HAS BEEN PUBLISHING A "NUTS AND BOLTS" MIMEOGRAPHED NEWSLETTER EACH 8 WEEKS, TO SUPPLEMENT THE QUARTERLY MIDDLE EAST NEWSLETTER RECEIVED FROM ATHENS. IN THE EVENT AND THE ATHENS RTDO IS PHASED OUT, IT IS POSSIBLE THAT EACH AREA POST WILL HAVE TO PUBLISH ITS OWN NEWSLETTER. THE EMBASSY WILL HAVE TO EXPAND ITS PRESENT EFFORTS, WHICH HAVE ADMITTEDLY BEEN SPORADIC DUE TO TRANSFERS AND RESIGNATIONS AOF PERSONS CHARGED WITH ITS ASSEMBLY, AND PUBLISH A MORE FORMAL NEWSLETTER. WE ESTIMATED THAT THERE COULD BE 2000 SUBSCRIBERS VERSUS THE CURRENT 1500 RECIPIENTS. AS INDICATED IN THE POST'S FY-78 CCP, WE HAVE REQUEST USIS TO QUERY RSC MANILA FOR ASSISTANCE ON A COVER FOR OUR CURRENT PUBLICATION "U.S. SAUDI TRADE."
ACTION TO BE TAKEN/ (1) IN ADDITION TO REQUEST FOR PRINTING OF COVER BY RSC MANILA, POST WILL REQUEST ASSISTANCE IN PRINTING OF ALL OF NEWSLETTER WHICH AVERAGES 15 PAGES.(2) DESIGN A COVER WITH USIS ASSISTANCE.(3) EXPAND SUBSCRIBER LIST. (4) HAVE USLO RIYADH AND DHAHRAN

DEVELOP EXPANDED LIST OF SUBSCRIBERS IN THEIR AREAS.
(5) USE OF COMMERCIAL LETTER FOR RECRUITMENT OF SAUDI
VISITORS IN FOREIGN BUYER PROGRAM (FBP).

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ACTION COME-00

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ACTIVITY NO 5 PRIORITY 5
AMERICAN CHAMBER OF COMMERCE IN SAUDI ARABIA
DESCRIPTION/JUSTIFICATION/OBJECTIVES.
THE FORMATION OF AN AMERICAN CHAMBER OF COMMERCE IN
SAUDI ARABIA OR A LOCAL AMERICAN-SAUDI ASSOCIATION OF
TRADE APPEARS TO BE A PRESSING NEED. THERE ARE NOW 325
U.S. FIRMS WITH OFFICES AND STAFF, MOSTLY U.S. NATIONALS,
IN SAUDI ARABIA. IN ADDITION, THERE ARE AN ESTIMATED
1500 OR MORE U.S. FIRM REPRESENTED BY SAUDI TRADING FIRMS
OR DISTRIBUTORS. SOME SAUDI FIRMS HAVE 20 OR MORE U.S.
AGENCIES. THIS IS BELIEVED TO EXCEED THE PEAK U.S.
PRESENCE IN BEIRUT IN THE PRE-STRIFE ERA IN LEBANON. THE
GROWTH OF U.S. COMPANY PRESENCE, MOSTLY OCCURING IN THE
PAST TWO YEARS, REFLECTS THE EVER INCREASING IMPORTANCE
OF THE SAUDI MARKET. SINCE MOST OF THE U.S. FIRM S ARE
NEWLY ESTABLISHED HRE, THE NEED FOR ASSISTANCE IN
INTERPRETING LOCAL LAWS AND KEEPING THEM INFORMED ABOUT
TRADE AND SERVICE OPPORTUNITIES HAS GROWN CONSIDERABLY.
AS AN INDICATION OF THE NEED TO KEEP EACH OTHR INFORMED.
INFORMAL AND EXTRA-LEGAL AMERICAN BUSINESSMEN'S GROUPS
HAVE BEEN ESTABLISHED INDEPENDENTLY IN JIDDA AND DHAHRAN
AND AN INTERNATIONAL BUSINESSMEN'S GROUP EXISTS NOW IN
RIYADH. SAUDI LAW PRESNETLY PROHIBITS THE FORMATION OF
SOCIETIES, ASSOCIATIONS AND SUCH GROUPS. DISCUSSIONS
WITH SAUDI OFFICIALS , INCLUDING THE U.S. EDUCATED MINISTER
OF COMMERCE, INDICATE A RELUCTANCE TO SANCTION THE
ESTABLSIHMENT OF FOREIGN - ORIENTED CHAMBERS OF COMMERCE
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OR ASSOCIATIONS IN THE KINGDOM. HOWEVER, THE MINISTER OF COMMERCE'S ONLY OBJECT ION AT PRESENT TO THE FORMATION OF A U.S. SAUDI CHAMBER OF COMMERCE HERE IS THAT THIS WILL CAUSE A PROLIFERATION OF SUCH CHAMBERS AMONG OTHER NATIONAL NATIONALS, SUCH AS THE FRENCH, GERMAN , BRITISH, KOREAN. JAPANESE, ETC. WITH WHICH THE GOVERNMENT WILL FIND IT HARD TO COPE. GIVEN THE SIZE OF THE AMERICAN BUSINESS COMMUNITY AND THE MUTAL BENEFITS THAT AU.S. CHAMBER WILL ADD TO SAUDI-AMERICAN TRADE RELATIONS, THE TIME MAY BE PROPITIOUS TO PURSUE THE MATTER FORMALLY WITH THE SAG. LOCAL INHIBITIONS, HOWVER, MUST BE OVERCOME, NOT ONLY FROM THE SAUDIS BUT FROM SOME PAROCHIAL MINDED AMERICANS WHO ARE CONTENT WITH THERI INFORMAL GROUPINGS. THE LATER USUALLY BREAK DOWN AND LOSE IMPACT WHEN CONTINUTIY IS LOST AND LEADERS ARE TRANSFERRED. THE FORMATION OF AN AMERICAN CHAMBER OF COMMERCE, BY WHATEVER NAME IT IS GIVEN WITH AN EXECUTIVE DIRECTOR WHO CAN PROVIDE CONTINUTITY WILL EASE THE HEAVY BURDEN AND NECESSITY OF THE EMBASSY, USLO RIYADH AND DHAHRAN PROVIDING INDIVIDUAL SERVICES TO THE LARGE NUMBER OF U.S. FIRMS IN SAUDI ARABIA. AT PRESNET ONLY THE ADDITION IN POST STAFF CAN ADEQUATELY SERVE THE U.S. BUSINESS COMMUNITY'S FULL NEEDS. ESTABLISHMENT OF A PRIVATE FORMAL U.S. GROUP COULD OBIATE THE CONTINUING CHORE OF UPDATING THE U.S. FIRM'S LIST, THE DISSEMINATION OF LOCAL LAWS AND REGULATIONS AND COMPILATION OF DOCUMENTS DEALING WITH MANPOWER AND CONSTRUCTION COSTS. MORE ATTENTION COULD AND SHULD BE PAID BY THEPOST TO MAJOR PROJECTS AND TRADE OPPORTUNITY REPORTING. EACH NEW U.S. FIRM ESTABLISHING IN THE COUNTRY TAKES UP HOURS OF COMMERCIAL OFFICERS' TIME, NOT ONLY ON FIRST ARRIVAL BUT CONTINUALLY WHEN PROBLEMS ARISE THAT COULD BE HANDLED CENTRALLY BY A U.S. CHAMBER OF COMMERCE.

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ACTIONS: (1) EFFECT A CAMPAIGN TO EXPLORE AND WEIGH THE PROSPECTS FOR AND POTENTIAL OF AN AMERICAN CHAMBER OF COMMERCE WITH RESIDENT U.S. FIRMS. (2) BASED ON PROVEN INTEREST OF THE AMERICAN COMMUNITY, FORMALY PROPOSE TO THE SAG THE ESTABLISHMENT OF A U.S. CHAMBER, AT THE PROPITIOUS MONENT, (3) ALLAY SAUDI FEARS ABOUT PROLIFERATION BY SUGGESTING LOCAL REGULATIONS STIPULATING THAT ONLY THOSE COUNTRIES CAN FORM SUCH GROUPS WHICH HAVE ANAPPRO APPRPRRIATE MINIMUM OF NATIONAL (SAY 300) COMPANIES WITH AFFILIATES IN SAUDI ARABIA. (4) COMMERCE TO BE REQUESTED BY THE POST , WHEN THE PROSPECTS LOOK BRIGHTER, TO APPROACH

THE AMERICAN CHAMBER OF COMMERCE HEADQUARTERS IN WASHINGTON
FOR APPROPRIATE ASSISTANCE IN FORMULATING A PLAN FOR A
BRANCH IN SAUDI ARABIA.
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Message Attributes

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